

3.6 REMARKS CODING

Introduction

Respondent remarks are comments supplied by the respondent either orally or in writing and are stored in DATALIB.NOTES. Respondent Text, which should not be confused with Remarks coding, is a textual response to a specific item on the form and stored in DATA##.RTyyyypp.

Remarks coding allows clerks in the National Processing Center (NPC) to code respondent remarks that have been keyed by the NPC data capture unit. Keyed data entry creates a file of survey data that is then transferred into StEPS.

The overall flow of the remarks coding process is as follows:

- (1) Data is received in NPC
- (2) Data, which may include remarks, is keyed by NPC clerks
- (3) Data is then transmitted to MCS
- (4) Data is run through StEPS batch update program
- (5) Survey files are updated and disposition listings are output
- (6) Clerks then access the “Remarks coding” screen for a specified survey
- (7) Clerks read the remark for an ID, which was populated through batch update, and code the remark.

NOTE: How a remark is coded will depend on the specifications written for that particular survey.

Accessing the Screen(s)

- Click on the COLLECTION ACTIVITIES button from the StEPS Main Menu.
 - Click on the REMARKS CODING button from the Collection Activities Menu.
 - Select the “Code Remarks” option. (This option allows you to code remarks for a survey. See screen below.)
- or
- Select the “Review Coded Remarks” option. (This option allows you to review the IDs that have been coded for a survey. You must have DATAPRIV= ‘P’ to access this screen. See section 3.6.4)

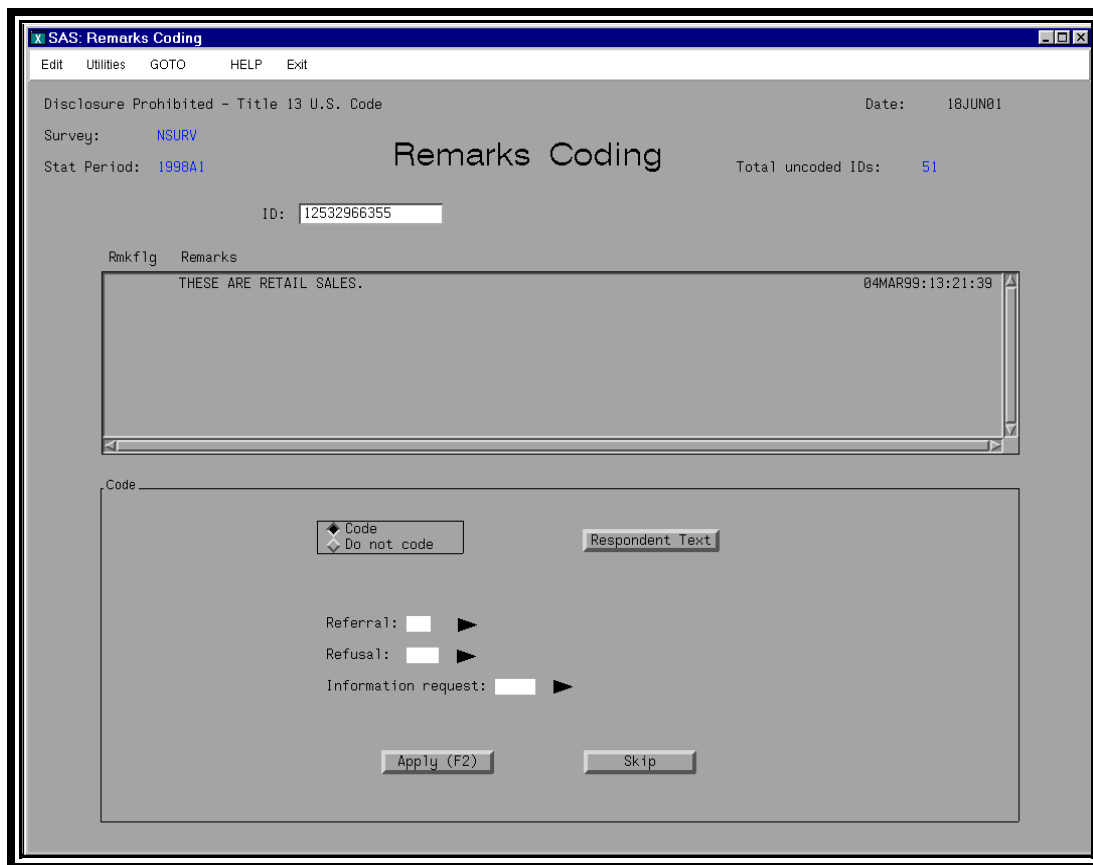


Figure 3.6 Code Remarks Screen

Screen Features

The “Code Remarks” screen contains a Header section and a Remarks section. The Header section contains the survey, the stat period, the total number of uncoded IDs, the data/time stamp, and the ID currently being processed. The Remarks section displays the remarks for the ID and information on coding the remark.

When the “Code Remarks” option is selected, the screen will display the ID and the corresponding remark (TEXT) for the first available case in DATALIB.NOTES that meets the following criteria:

1. The source of the note (NOTESRCE) is a respondent note (‘R’).
2. The remarks coding flag (RMKFLG) field is ‘blank’ denoting that the note for the ID has not been examined via the remarks coding process.
3. The remark is in the base statistical period (STATP).
4. The ID is not currently locked by another user.

3.6.1 HEADER SECTION

Survey

- Displays the survey currently being processed.
 - This field is not correctable.
 - To change the survey, you must access the Survey Selection screen from USER SETUP (See Chapter 1.1).
-

Stat Period

- Displays the default stat period currently being processed.
 - This field is not correctable.
 - To change the stat period, you must access the Survey Selection screen from USER SETUP (See Chapter 1.1).
-

ID

- Displays the ID of the case being reviewed.
 - This field is not correctable.
 - To access the next ID with a respondent note, select the 'Skip' button at the bottom of the screen.
-

Total Uncoded IDs

- Displays the number of IDs that have not been coded. (This number will decrease as remarks are coded or increase when uncoded notes are entered.)
- This field is not correctable.

3.6.2 REMARKS SECTION

The remarks section is divided into two subsections: ID remarks and code. The ID remarks subsection contains the remark from the form, associated remark flag, if any, and the time the remark was keyed for the specified ID. The code subsection allows you to specify codes to be associated with the remark.

ID REMARKS

- This section displays information clerks use to assist in coding remarks for the specified ID:

RMKFLG	Remarks coding flag; denotes whether this note has been processed in the remark coding process. Possible codes are as follows:
‘C’	The note has been examined and codes were set as a result
‘N’	The note has been examined and no codes were set
‘Blank’	The note has not been examined via the remarks coding process
Remarks	Displays the comments supplied by the respondent either orally or in writing.
Date/Time	Displays the date/time the note was entered.

CODE

- Click on the ‘Code’ radio button to begin the process of coding a remark for the specified ID. The Referral, Refusal, and Information Request options will be activated:

Referral

The referral flag is primarily used when a clerk in NPC identifies a case that needs further review from a survey analyst.

- Click on the arrow to display a list of available referral codes:

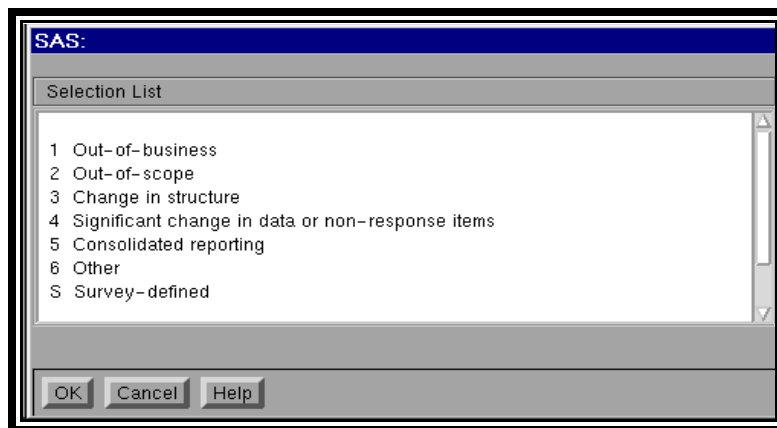


Figure 3.6.2a Referral code selection screen

- Click on the referral option you want to select.
- Click on ‘OK’ to populate the screen with the referral code.
- Click on ‘CANCEL’ to return to the screen.

5. When a 'Referral' code is selected:

- The analyst referral flag (ANLREF) in DATAxx.C1yyyypp will be set with the new value. As previously indicated, this flag is usually set by NPC to indicate that an analyst needs to review the case for potential status changes.
- The remarks coding flag (RMKFLG) in DATALIB.NOTES will equal 'C'. The 'C' denotes that the note has been examined and codes were set as a result.

Refusal

The refusal flag allows a clerk in NPC to specify a code to be associated with a refusal remark received from a company.

1. Click on the arrow to display the following list of refusal entries:

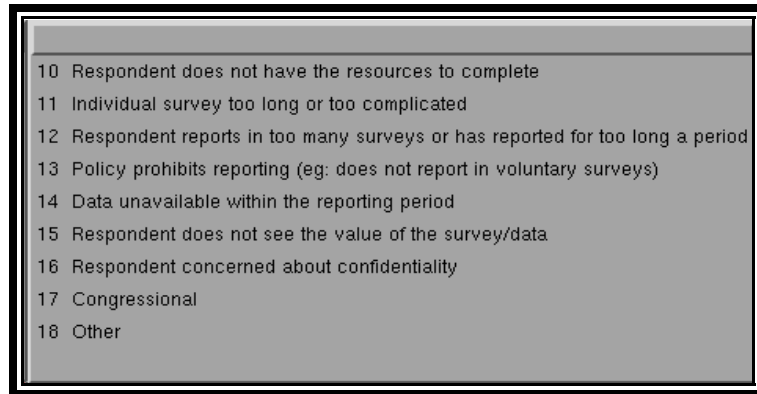


Figure 3.6.2b Refusal code selection screen

2. Click on the refusal code you want to select.

3. The refusal field on the "Code Remarks" screen will be populated with the selected refusal code.

4. Click on 'CANCEL' to return to the screen.

5. If a 'Refusal' code is selected:

- The refusal category (REFCAT) field in DATAxx.C1yyyypp will be set with the new value. This value will be one of the refusal codes listed above indicating the reason the ID is a refusal.
- The refusal indicator (REFIND) field in DATAxx.C1yyyypp will equal 'R'. The refusal indicator denotes that this ID is either a refusal (R), a pending refusal (S) where the respondent doesn't report over a period of time, but never actually refuses,

or (blank) where the case is not a refusal.

- The remarks coding flag (RMKFLG) in DATALIB.NOTES will equal 'C'. The 'C' denotes that the note has been examined and codes were set as a result.

Information Request

The information request flag is used when the respondent requests additional information:

1. Click on the arrow to display the following entries:

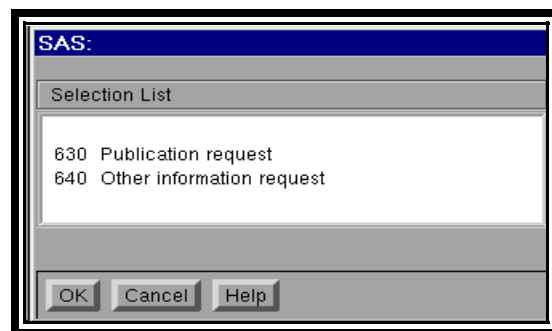


Figure 3.6.2c Information Request screen

2. Click on the collection code you want to select.
 3. Click on 'OK' to populate the screen with the information collection code.
 4. Click on 'CANCEL' to return to the screen.
 5. If changes have been made to the 'Information Request' field:
 - A record will be added in DATALIB.COLHIST with the new collection code (COLCDE) and the collection date (COLDTE) will be updated with the current date. (See Section 3.4, Collection History, for more information.)
 - The remarks coding flag (RMKFLG) in DATALIB.NOTES will = 'C'. The 'C' denotes that the note has been examined and codes were set as a result.
- Click on the "Do not code" radio button if you do not want a code to be associated with the specified ID.
 - The Referral, Refusal, and Information Request options will all be shaded.
 - The remarks coding flag (RMKFLG) in DATALIB.NOTES will equal 'N'. An 'N' denotes that the note has been examined and no codes were set.

- Click on the “Respondent Text” button to see any respondent text associated with the ID. As previously indicated Respondent Text, which is commonly confused with Remarks coding, is a textual response to a specific item on the form and stored in DATA##.RTyyyypp.
- Click on the “Skip” button to advance to the next ID in the selection set.

3.6.3 UPDATING REMARKS CODING

- You can update a remarks coding provided:
 1. You have the proper privileges to correct data (DATAPRIV = ‘U’ or ‘P’).
 2. The stat period is specified in the VSTATP file as being a correctable stat period.

An error message will display if you attempt to update remarks and you do not have the proper privileges or the stat period is not correctable.

- Once you have selected a referral, refusal, and/or an information request flag, save the changes by:
 1. Selecting the ‘Apply corrections’ option from the EDIT pmenu.
 2. Pressing F2.
 3. Clicking on the ‘Apply (F2)’ button at the bottom of the screen.
- You must apply corrections before exiting the screen. If you have selected a flag and attempt to exit the screen without first applying the corrections, a warning message will display:

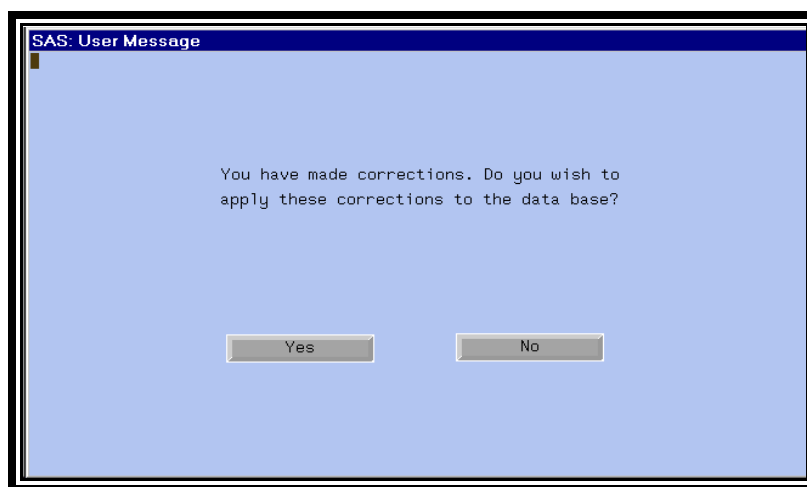


Figure 3.6.3 Apply Corrections Confirmation screen

1. Click on 'Yes' to apply the corrections.
2. Click on 'No' to cancel the changes.

P-Menus

P-Menu	Options	Function
EDIT	Apply corrections (F2)	Apply corrections to database
UTILITIES	Print	Print Remarks for ID
GOTO	Remarks Coding Review Notes (Ctrl-N)	Access Remarks Coding review screen for ID Access Notes screen for ID
HELP	Remarks Coding (F1) WhoamI (F7)	Display help information on using the Remarks Coding screen Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen

3.6.4 REVIEW CODED REMARKS

Screen Features

The "Review Coded Remarks" screen is used primarily by supervisors to review the IDs that have already been coded by NPC clerks, but this screen can also be used to code remarks as a result of the review. You must have DATAPRIV = 'P' to access this screen.

The screen contains a Header section and a Working ID section. The Header section contains information that is identical to the "Code Remarks" screen, but also includes an option to specify what information is to be displayed in the working ID section for an ID. The Working ID section displays the remarks for the ID and information from the coding of previously reviewed remarks.

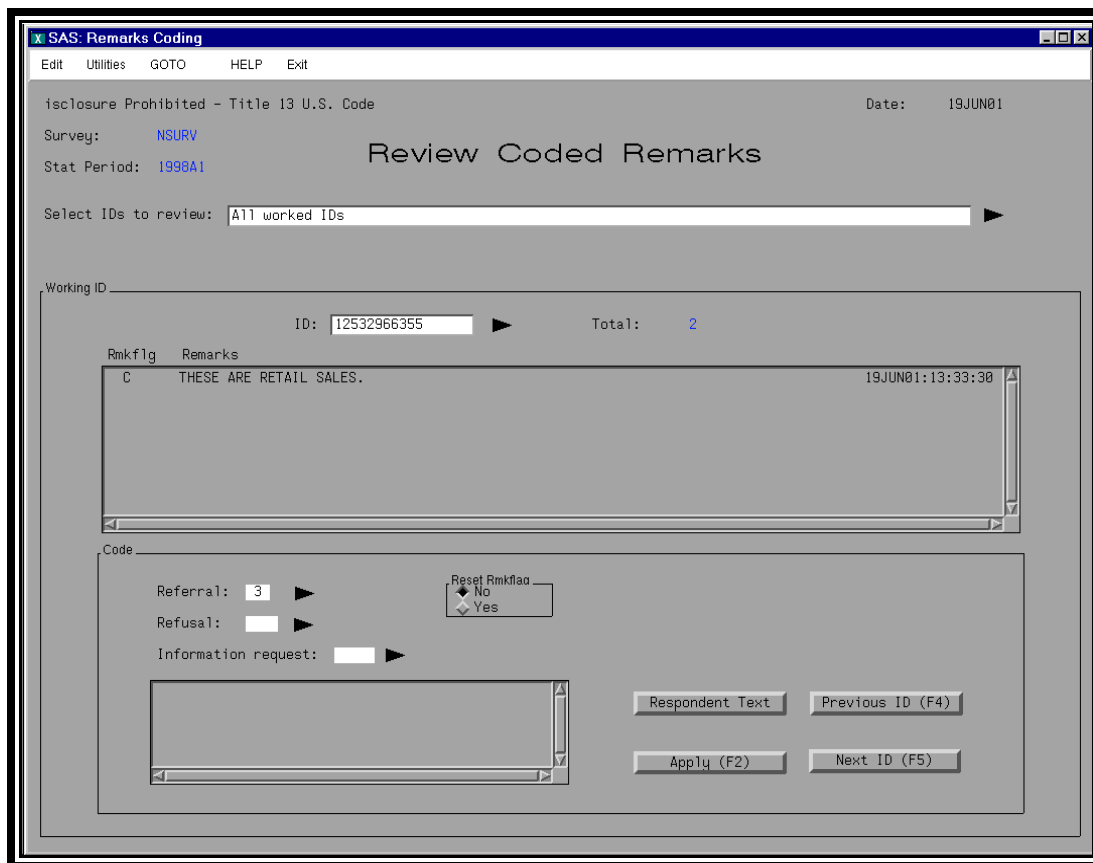


Figure 3.6.4a Remarks Coding screen

3.6.5 HEADER SECTION

Survey	Displays the survey currently being processed.
Stat Period	Displays the default stat period currently being processed.
Date/Time	Displays the date/time the note was entered.
Select IDs to review	This option allows you to subset reviewed ID's into categories. Click on the arrow to display the following options:

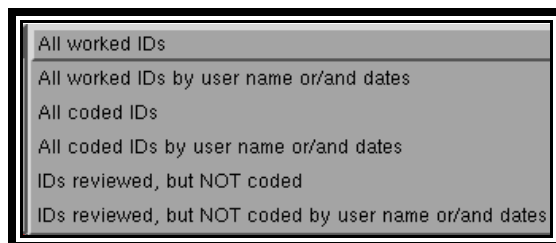


Figure 3.6.5a Select ID's to review option screen

1. The “All worked IDs” option will display all ID's with remarks that have been reviewed for the current stat period.
2. Select the “All worked IDs by user name or/and dates” option to display the following:

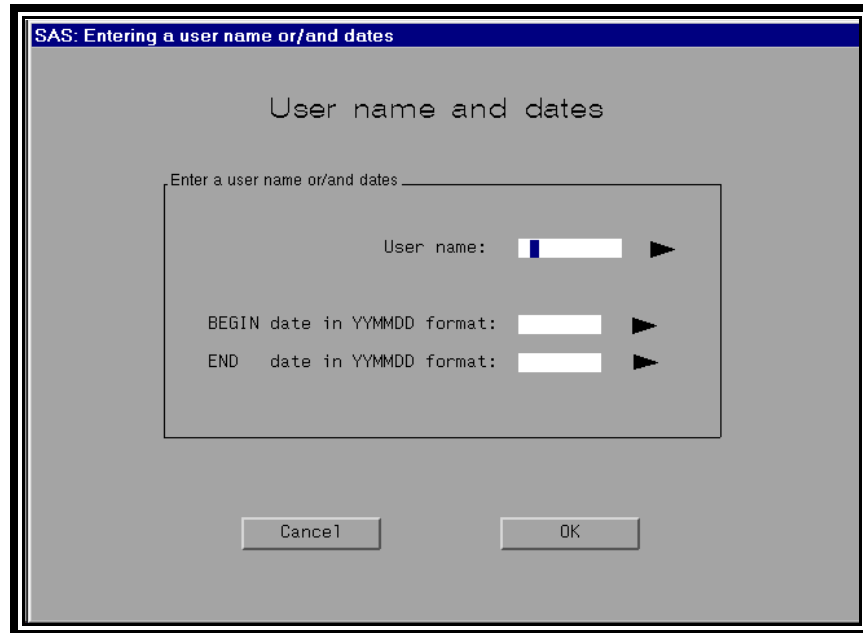


Figure 3.6.5b User name and date selection screen

This screen allows you to either specify a date range for all worked IDs or select a username associated with the IDs that have been reviewed.

- Enter a username or click on the picklist option to select from a list of users who have reviewed remarks.
 - Enter a date or click on the picklist option next to the BEGIN and END date fields to display a list of dates in descending order beginning with today's date.
3. The “All coded IDs” option will display all IDs with remarks for the current stat period where the remarks coding flag in DATALIB.NOTES = ‘C’.
 4. The “All coded IDs by user name or/and dates” option allows you to either specify a date range for all coded IDs or select a username associated with the coded IDs. (See Figure 3.6.4b above for screen caption.)
 5. The “IDs reviewed, but not coded” option displays all cases for the current stat period where the remarks coding flag = ‘N’.

6. The “IDs reviewed, but not coded by user name or/and dates” option allows you to either specify a date range for all IDs reviewed, but have not been coded or select a username associated with the IDs reviewed, but not coded. (See Figure 3.6.4b above for screen caption.)

3.6.6 WORKING ID SECTION

Like the remarks section on the “Code Remarks” screen, the working ID section is subdivided into two sections: ID remarks and code. The ID remarks section contains ID, the total number of IDs with remarks coding, the remark from the form, associated remark flag, if any, and the time the remark was keyed for the specified ID. The code section allows you to view or specify referral, refusal, and/or information request codes to be associated with the remark.

ID REMARKS

- **ID** Displays the ID of the case being reviewed. Click on the picklist to display a list of IDs. The number of IDs available will depend on the category selected from the ‘Select IDs to review’ option in the header section.
- **TOTAL** Displays the total number IDs with a remarks coding. The total number displayed will depend on the category selected from the ‘Select IDs to review’ in the header section.
- **RMKFLG** Remarks coding flag; denotes whether this note has been processed in the remark coding process. Possible codes are as follows:
 - ‘C’ The note has been examined and codes were set as a result
 - ‘N’ The note has been examined and no codes were set
 - ‘Blank’ The note has not been examined via the remarks coding process
- **Remarks** Displays the comments supplied by the respondent either orally or in writing.
- **Date/Time** Displays the date/time the note was entered.

CODE

In the “Review Coded Remarks” screen, the referral, refusal, and/or information request fields may already be populated with codes because IDs were previously reviewed and coded by an NPC clerk using the “Code Remarks” screen.

To view the description of a code, click on the arrow to display the picklist for the referral, refusal, and/or information request fields.

To change a code, select the arrow to display the picklist for the referral, refusal, and/or information request fields. (See section 3.6.2 on selecting a code for the refusal, referral, and information request fields.) Then reset the “Remark” flag to reflect this action.

Resetting the Remark flag

- The ‘Reset Rmkflg’ radio button will be initially set to ‘No’ when you access the screen indicating that you do not want to change the remarks coding flag stored in DATALIB.NOTES.
- If you want to change the remarks coding flag (RMKFLG) that was set in the “Code Remarks” screen, click on the ‘Yes’ button. The following pop-up screen will display:

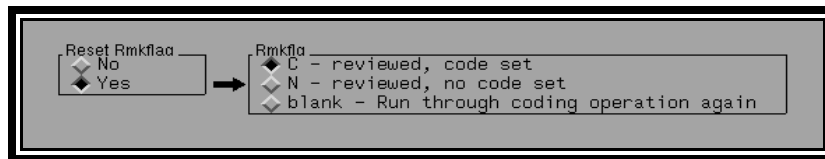


Figure 3.6.6a Resetting remarks coding flag caption

1. Click on the radio button next to ‘C’ to set the remarks data flag as having been reviewed and a code has been set. This option is used if the supervisor or analyst changes a code.
 2. Click on the radio button next to ‘N’ to set the remarks data flag as having been reviewed and a code should not be set.
 3. Click on the radio button next to ‘blank’ to send the remarks through the remarks coding operation again. This will recode the remarks field for this ID.
- To change the remarks flag to either ‘N’ or ‘blank’, the referral, refusal, and/or information request codes that exist must all be deleted. If not, the following message will appear:

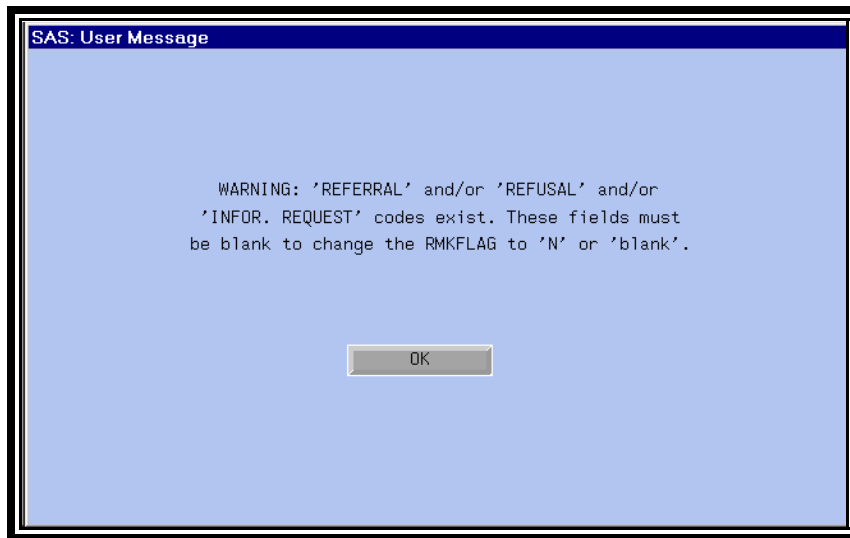


Figure 3.6.6b Warning Message

If this message appears, click on 'OK' to revert back to the 'Review Coded Remarks' screen to make the necessary corrections.

- Click on the "Respondent Text" button to see any respondent text associated with the ID. As previously indicated, Respondent Text, which is commonly confused with Remarks coding, is a textual response to a specific item on the form and stored in DATA##.RTyyyypp.
- To access an ID that was previously reviewed:
 1. Click on the 'Previous ID' button at the bottom of the screen.
 2. Press F4.
- To access the next ID to review for coded remarks:
 1. Click on the 'Next ID' button at the bottom of the screen.
 2. Press F5.

3.6.7 UPDATING REVIEWED CODED REMARKS

- You can update a remarks code that has been reviewed provided:

1. You have the proper privileges to correct data (DATAPRIV = 'P').
2. The stat period is specified in the VSTATP file as being a correctable stat period.

An error message will display if you attempt to update remarks and you do not have the proper privileges.

- Once you have modified the referral, refusal, and/or an information request flag field, save the changes by:
 1. Selecting the “Apply corrections” option from the EDIT pmenu.
 2. Pressing F2.
 3. Clicking on the “Apply (F2)” button at the bottom of the screen.
- You must apply corrections before exiting the screen. If you have selected a flag and attempt to exit the screen without first applying the corrections, a warning message will display:

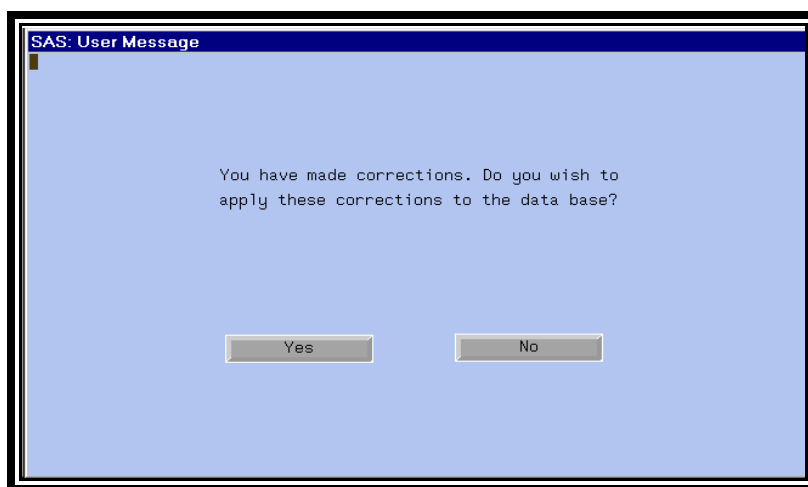


Figure 3.6.7 Apply Corrections Confirmation screen

1. Click on “Yes” to apply the corrections.
2. Click on “No” to cancel the changes.

P-Menus

P-Menu	Options	Function
EDIT	Apply corrections (F2)	Apply corrections to database

P-Menu	Options	Function
UTILITIES	Previous ID (F4) Next ID (F5) Print	Access previous ID in selection set Access next ID in selection set Print Remarks for ID
GOTO	Notes (Ctrl-N)	Access Notes screen for ID
HELP	Remarks Coding (F1) WhoamI (F7)	Display help information on using the Remarks Coding screen Display user default and systems information
EXIT	Exit (F3)	Exit to previous screen